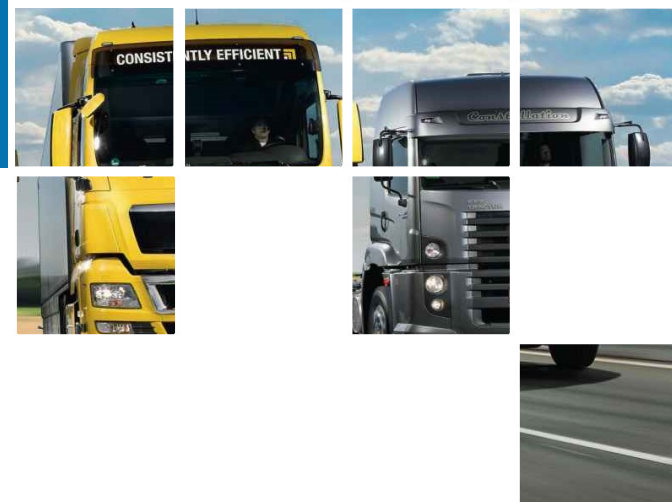


Fleet Management in South Africa



Fleet Management in South Africa is the second consecutive report from Berg Insight analysing the latest developments on the South African fleet management market. For the first time, the new edition of the report also includes an outlook on the African market beyond South Africa.

This strategic research report from Berg Insight provides you with 100 pages of unique business intelligence including 5-year industry forecasts and expert commentary on which to base your business decisions.

Highlights from the second edition of the report:

- ◆ **Insights** from numerous interviews with market-leading companies.
- ◆ **New data** on vehicle populations and commercial fleets in South Africa and other African countries.
- ◆ **Comprehensive overview** of the fleet management value chain and key applications.
- ◆ **In-depth analysis** of market trends and key developments.
- ◆ **Updated profiles** of 24 aftermarket fleet management solution providers.
- ◆ **Summary** of OEM propositions from commercial vehicle brands.
- ◆ **Market forecasts** lasting until 2021.
- ◆ **Outlook** on the African fleet management market beyond South Africa.

The installed base of FM systems in South Africa will reach 1.9 million units by 2021

In spite of the country's weak economic performance, Berg Insight is of the opinion that the market for fleet management in South Africa is in a growth period which will continue in the years to come. The number of FM systems in active use is forecasted to grow at a compound annual growth rate (CAGR) of 12.6 percent from 1.1 million units at the end of 2016 to 1.9 million by 2021. The penetration rate in the total population of non-privately owned fleet vehicles used by businesses is at the same time estimated to increase from 24.1 percent in 2016 to 39.6 percent in 2021. South Africa is a relatively mature telematics market and the penetration is comparably high from an international perspective. Far from all deployments are however full-scale advanced FM solutions. A notable share of the installed fleet telematics systems on the South African market is represented by low-end tracking systems, e.g. light FM solutions, including SVR systems extended with basic FM features.

The South African fleet management market is dominated by five players with broad telematics portfolios which are all headquartered in the country and have installed bases of over 100,000 FM units each. Berg Insight ranks Cartrack and MiX Telematics as the largest providers of fleet management solutions in South Africa, both having

estimated installed bases in the range of 150,000–200,000 active units in the country, followed by Ctrack and Altech Netstar. Tracker has also provided more than 100,000 active FM systems in the country where some of them are powered by TomTom Telematics. Other renowned international providers active on the market include Pointer Telocation and Geotab. Foreign telematics players have however generally not managed to achieve any top-ranking market shares on the South African fleet management market so far. Additional examples of domestic aftermarket players include Digit Vehicle Tracking (Digicell), GPS Tracking Solutions (Eqstra Fleet Management), SmartSurv Wireless, Autotrak and Autowatch Telematics (PFK Electronics). Commercial vehicle OEMs including Daimler, Scania, MAN and Volvo Group have moreover introduced fleet telematics solutions in South Africa, though the adoption levels generally remain relatively modest so far.

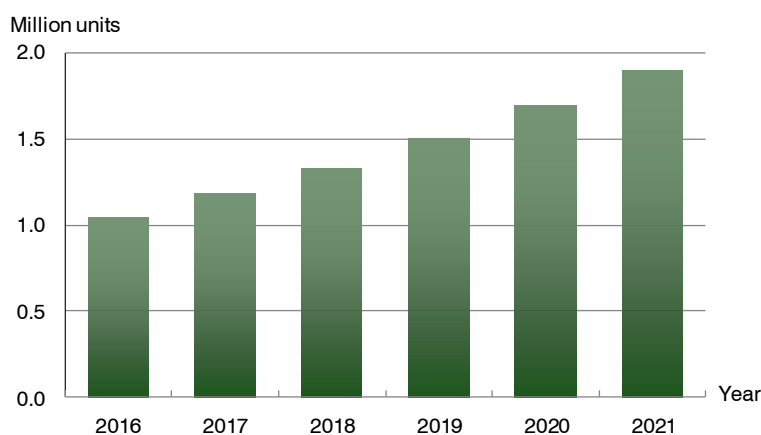
The report also includes an outlook on the overall African market. Africa is clearly a highly diverse geographic region from a fleet management perspective. The continent can in general be divided into three subregions – South Africa, Sub-Saharan Africa (excluding South Africa) and Northern Africa. South Africa is in general well ahead of the rest of the continent in terms of adoption.

Berg Insight's M2M Research Series

What are the key business opportunities in the emerging wireless M2M/IoT market? Berg Insight's M2M Research Series is a unique series of 25 market reports published on a regular basis. Each title offers detailed analysis of a specific vertical application area such as smart metering, fleet management or vehicle telematics. Once per year we also publish summaries of our research with detailed forecasts for the Global and European wireless M2M markets, respectively.

This report answers the following questions:

- ◆ How does the fleet management market in South Africa compare with other markets?
- ◆ What is the price level of South African fleet telematics solutions?
- ◆ Which are the leading domestic providers of aftermarket fleet management solutions?
- ◆ Which international fleet management providers are targeting the South African market?
- ◆ What hurdles are there for foreign players?
- ◆ What offerings are available from commercial vehicle OEMs?
- ◆ What challenges and opportunities are there in the rest of Africa?
- ◆ Will the FM industry consolidate further during 2017–2018?
- ◆ How will the commercial vehicle telematics industry evolve in the future?



Installed base of active fleet management units (South Africa 2016–2021)

Berg Insight offers premier business intelligence to the telecom industry. We produce concise reports providing key facts and strategic insights about pivotal developments in our focus areas. Berg Insight also offers detailed market forecast databases and advisory services. Our vision is to be the most valuable source of intelligence for our customers.

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Who should buy this report?

Fleet Management in South Africa is the foremost source of information about the commercial vehicle telematics and fleet management market in this region. Whether you are a telematics vendor, vehicle manufacturer, telecom operator, investor, consultant, or government agency, you will gain valuable insights from our in-depth research.

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Table of Contents Fleet Management in South Africa

1	Fleet management solutions	2	Market forecasts and trends	3	Company profiles
1.1	Fleet management infrastructure	2.1	Market analysis	3.1	International aftermarket solution providers
1.1.1	Vehicle segment	2.1.1	The South African vehicle market	3.1.1	Ctrack (Inseego)
1.1.2	GNSS segment	2.1.2	Fleet management installed base and unit shipments	3.1.2	Geotab
1.1.3	Network segment	2.1.3	Fleet management vendor market shares	3.1.3	MIX Telematics
1.1.4	Backoffice segment	2.1.4	Local market characteristics in South Africa	3.1.4	Pointer Telocation
1.2	Vehicle segment	2.2	Market drivers and barriers	3.1.5	TomTom Telematics
1.2.1	Vehicle diagnostics and maintenance planning	2.2.1	Macroeconomic environment	3.2	Local aftermarket solution providers
1.2.2	Security tracking	2.2.2	Regulatory environment	3.2.1	ACM Track
1.3	Driver management	2.2.3	Competitive environment	3.2.2	Afritelematics
1.3.1	Driving data registration and analysis	2.2.4	Technology environment	3.2.3	Altech Netstar
1.3.2	Video-based driver monitoring	2.3	Value chain analysis	3.2.4	Autotrak
1.3.3	Eco-driving schemes	2.3.1	Telematics industry players	3.2.5	Autowatch Telematics (PFK Electronics)
1.3.4	Insurance risk management	2.3.2	Automotive industry players	3.2.6	Bidtrack (Bidvest Group)
1.4	Operations management	2.3.3	Telecom industry players	3.2.7	Cartrack
1.4.1	Routing and navigation	2.3.4	IT industry players	3.2.8	Digit Vehicle Tracking (Digicell)
1.4.2	Transport management	2.4	Future industry trends	3.2.9	Globaltrack
1.4.3	Mobile workforce management	2.5	African fleet management market outlook	3.2.10	Gosafe Tracking Solutions SA
1.5	Regulatory compliance and reporting	2.5.1	Leading South African telematics players active in the Rest of Africa	3.2.11	GPS Tracking Solutions (Eqstra Fleet Management)
1.5.1	Driver working hours, logbooks and tachographs	2.5.2	Other African fleet management providers and distributors	3.2.12	Key Telematics and partners
1.5.2	Electronic toll collection – e-toll and e-tags	2.5.3	International players active on the African fleet management market	3.2.13	Mtrack (Electronic Tracking Systems)
1.5.3	SARS travel logbooks	2.5.4	OEM fleet telematics offerings in Africa	3.2.14	Pointer SA
1.5.4	Traffic fine management and demerit points – AARTO	2.5.5	The African vehicle market	3.2.15	Real Telematics
1.5.5	Road Transport Management System (RTMS)	2.5.6	Analysis of the fleet management market in the Rest of Africa	3.2.16	SmartSurv Wireless
1.5.6	Distracted driving	2.5.7	The size of the African fleet management market	3.2.17	Tracker Connect
1.5.7	Special transports			3.2.18	Turaco Business Logix
1.6	Business models			3.2.19	We Track 24/7 (Pope Alarms)
					Glossary